

Human Numbers Workforce Management Services Agreement

Overview:

Workforce Management is the art and science of identifying the right number of people needed at the right time to meet service goals. Human Numbers uses a 19-point forecasting methodology that provides the necessary care and consideration to normalize trends from raw data to produce predictable and reliable forecasts. Our flexible scheduling methods are sensitive to the agent's need for a work-life balance while respecting the contact center's compliance rules. Our WFM Staffing Model clearly demonstrates the state of the contact center, how many people are needed to perform the work, when that hiring needs to occur, and when it can be safely postponed. We work remotely and provide our own equipment and software.

Human Numbers has extensive experience developing Workforce Management processes and implementing them, focusing on consistency of service, process, and culture. We combine real-world experience with expert data analysis to provide actionable recommendations.

Cost & Pricing (valid through the end of 2025):

We bill on a fixed price basis, providing you with a predictable cost for the work defined. Any scope changes will be discussed and documented, with costs adjusted (up or down) accordingly. The contract term is month-to-month, with a 30-day cancellation notice from either party. Our services are shown cafeteria-style, so you only pay for the services you need.

MONTHLY RATES:

First WFM Staffing Model, including one agent group (examples in Appendix B)	\$2,500/month
Additional Staffing Model	\$1,000/month
Forecasted Volumes, Handles Times, and Required Base Staff for a single forecast group (examples in Appendix A)	\$2,000/month
Additional Forecast Group(s)	\$500/month
Optimized scheduling service for up to 20 agents	\$3,000/month
Additional agents	\$30/agent/month

SETUP FEES & ONE-TIME SERVICES:

One-time setup fee	\$2,000
WFM Health Check	\$995/each group
Day Rate (Hourly Rate is \$200/hour)	\$1,500/day

We have extensive collaboration toolsets to work remotely. The Client pays all travel costs, so it only occurs upon request. We will bill reasonable travel expenses with each installment. These expenses may include airfare, hotel (business class – for example, Marriott or Hilton), rental car, taxi, mileage, meals, and other general expenses for each day spent on site. We provide estimated travel expenses for on-site visits before travel occurs.

Set-up and Configuration:

Initial setup and configuration include collecting historical volumes, testing, and publishing initial forecast drafts. We will also collect details from you about volume patterns, off-phone activities, call center shrinkage, goals, performance against key metrics, and agent schedule preferences. We will focus on Handle Time analysis, off-phone activity, and ACD data collection and review information on your organization, processes, operations, and technology to ensure a baseline understanding of your environment. It is the client's responsibility to supply all historical data, assumptions, and service goals.

Working Remotely:

Communication will repeatedly occur in three ways:

- I. Passively, through the data cleaning process - we analyze your volumes for data anomalies, aberrations, spikes, holidays, special factors, and intervals that failed to meet service goals.
- II. Actively, by publishing forecasts, optimizing schedules, and reviewing plans each week. We can also dial in remotely to pull your historical reporting data if necessary.
- III. Cooperatively, in the weekly tactical and monthly strategic meetings. We will be present via web conferences, and our availability will be flexible with you for these important conversations. We will be prepared to review the current forecasts and their performance. We will identify the forecasting trends that will assist in generating helpful discussions about the forecasting factors. We will also show you any special schedule optimizations that we find to improve your net staffing.

Delivery Methods:

In the spirit of keeping administration as simple as possible, we issue all external reports, forecasts, charts, and computer-generated communications with standard Microsoft Office Suite products, including Excel, PowerPoint, Word, and Outlook. Web conferencing collaboration services are provided from Human Numbers using Zoom, and file sharing through Dropbox.

Human Numbers' systematic forecasting approach includes:

- I. Weekly Tasks
 - a. Receive the historical data report for phone and task volumes.
 - b. Analyze the raw history and store aberrant data into special data sets.
 - c. Recompile volumes, handle time, and staff into groups at the enterprise level to update and refresh the time-of-day and day-of-week distributions.
 - d. Compare recent trends with older trends, validating the patterns.
 - e. Normalize ("clean") the data to account for holidays or situational exceptions.
 - f. Document the forecasting journal with notes from weekly data collection.
 - g. Present these findings in a weekly tactical meeting.
- II. Monthly Tasks
 - a. Measure the effectiveness of the current growth rate and make changes when necessary.
 - b. Update recent trends and week-of-year/month-of-year distributions.
 - c. Track monthly movement of Handle Time changes, noting variations.
 - d. Allocate the forecast requirements into staffing requirements.
 - e. Publish the results into standardized reports.
 - f. Document the forecasting journal with notes from the monthly reforecast.
 - g. Develop forecast review information in charts and graphs, comparing forecast deviation as year-over-year changes.
 - h. Present these findings in a monthly strategic meeting.

In addition to the volume forecasts, Human Numbers will collect your contact center assumptions and reforecast these each month with the WFM Staffing Model upon request. Examples of these reports are in Appendix B of this proposal.

ACCEPTANCE & AGREEMENT

All items listed under setup fees and one-time services are due upfront. Work will begin once we receive this payment. We bill monthly fees at the end of each calendar month.

By signing below, I agree that I have read and agree to the terms of this agreement. Please email a signed copy to tiffany@humannumbers.com.

Signature, **CLIENT**

Signature, Human Numbers, L.L.C.
4030 Orchard Way
Milton, GA 30004

Printed Name

Tiffany LaReau

Printed Name

Title

Owner

Title

Date

Month, DD, YYYY

Date

Your main contact for this work will be Tiffany LaReau, a Certified Workforce Planning Professional (received from the Society of Workforce Planning Professionals, SWPP.org) and an ICMI Certified Associate with 33 years of experience specifically devoted to workforce management. Human Numbers is categorized as a small, woman-owned business and is registered with SBA.gov and CCR.gov under CAGE# 5NVB7, DUNS# 828-961-693.

Tiffany LaReau
Owner & Certified Workforce Manager
Human Numbers, L.L.C.
4030 Orchard Way
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770/609-6565 Office
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Tiffany@HumanNumbers.com

APPENDIX A: Basic Forecasting Service

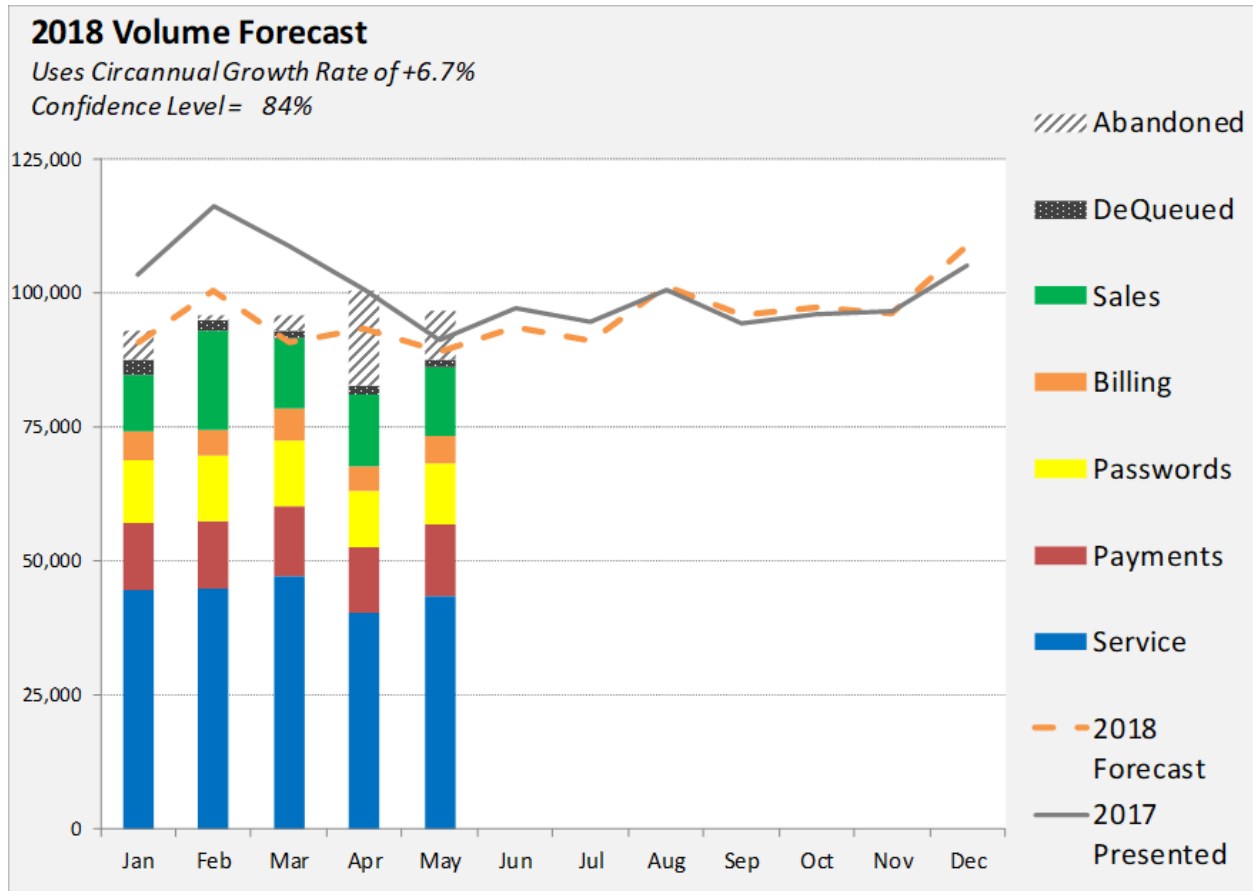


Figure 1: Monthly Volume Forecast

This is a sample monthly volume report. It includes the forecasted and actual volumes, along with the original forecasting baseline, and is reviewed (and re-forecasted) monthly.

Why is this important?

The volume forecast is the first step in calculating workload requirements. When we compare last month's actual volumes to the forecasted trend, it will give us the insight we need to adjust and tune the re-forecast for next month.

Keeping a rolling, 12-month forecast active is a critical step for a planning culture. It also supplies insight into the current forecasting method being used, that method's forecast potential, and the confidence level.

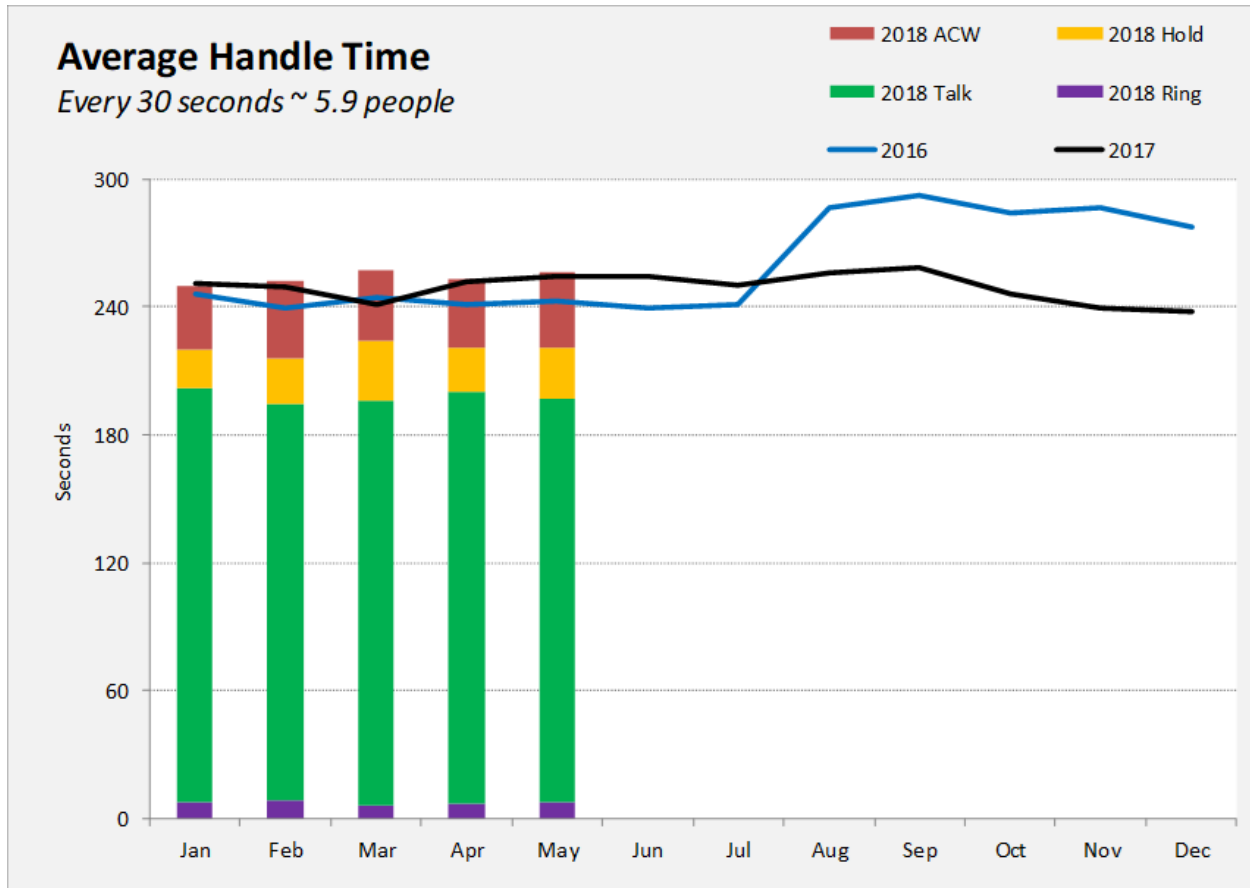


Figure 2: Handle Time Forecast

We review handle time once a week and reforecast this precisely for every day of the week and every interval each day. This is used with the volume forecast to produce the workload requirements.

Why is this important?

When Handle Time goes up, workload increases and required staffing headcount rises. It's also used to identify spikes where you may have learning curves to deal with. Breaking this down between Ring-Talk-Hold-ACW elements also allows you to show changes in AHT behavior.

APPENDIX B: Forecasts & WFM Staffing Model

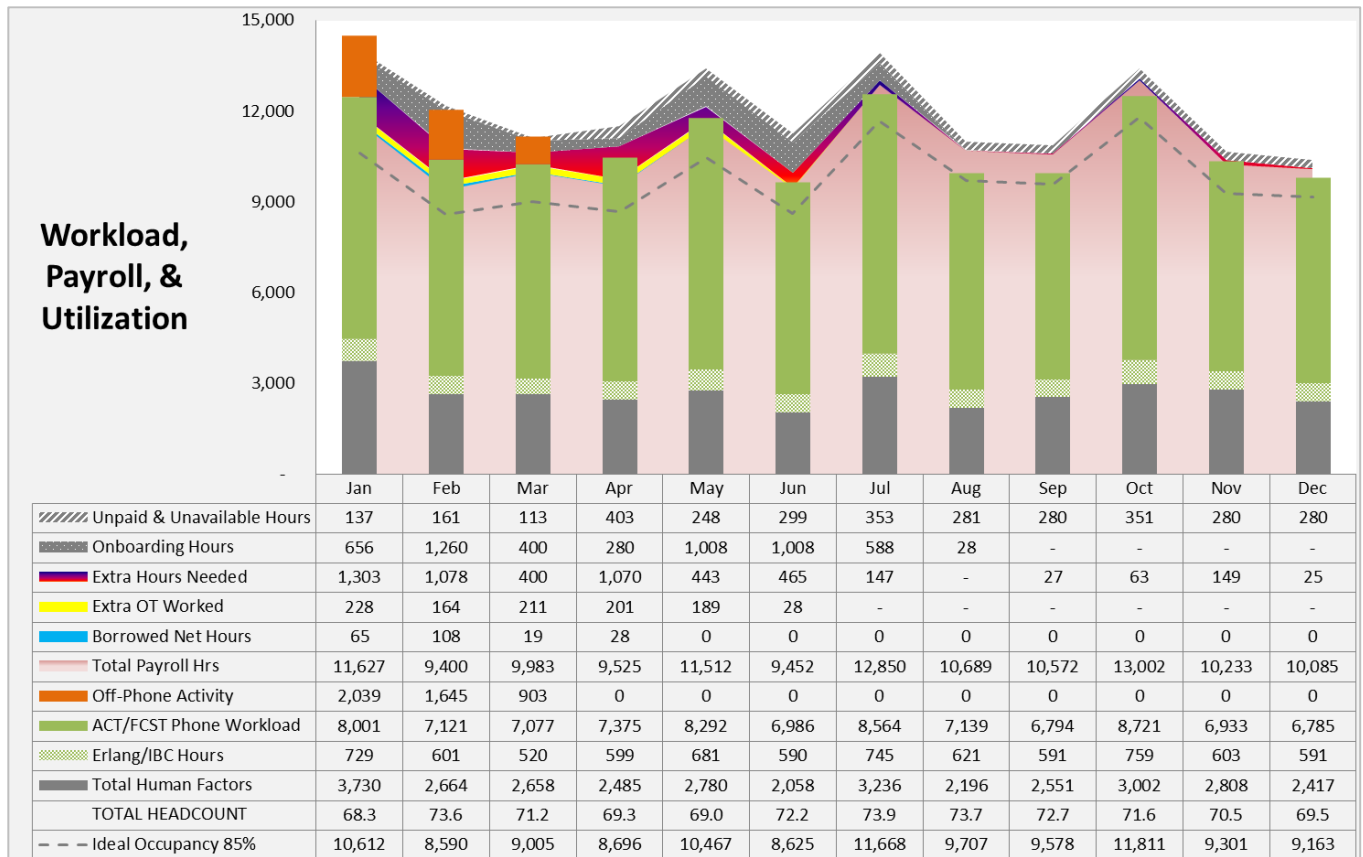


Figure 3: Monthly Staffing Hours with Shrinkage

This is the staffing hours projection chart, which includes total paid hours (the pink area), and the bars reflect your phone workload, your back-office workload, and the % of time lost due to shrinkage, all converted into hours.

Why is this important?

When we overlay the paid hours with the phone hours, back-office activities, and shrinkage hours, it visually shows where there may be extra capacity each month, which can then be turned into training opportunities. It also shows the months where workload exceeds the staff available, so you can make decisions about reallocating discretionary workload into other months when possible.

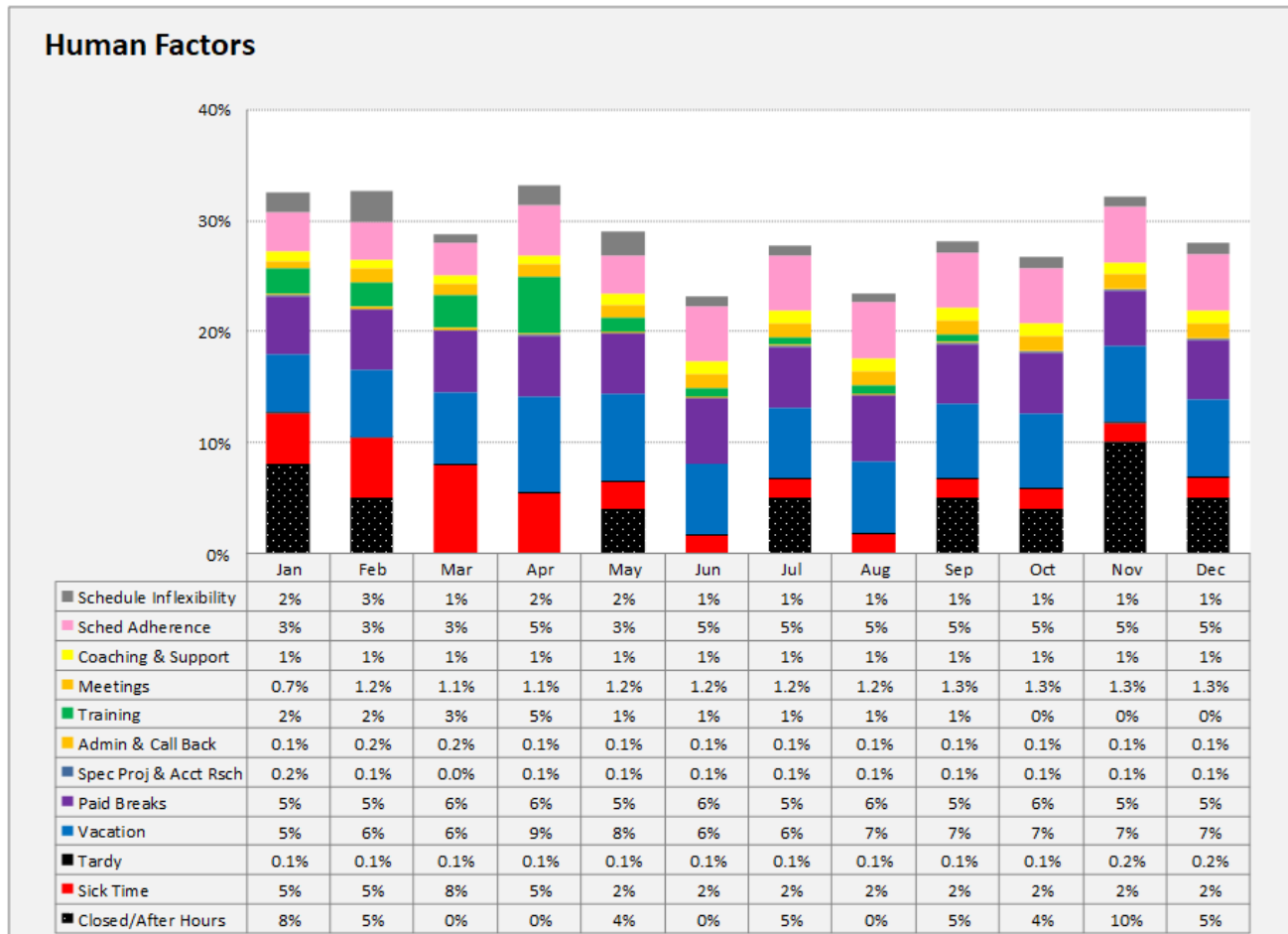


Figure 4: Human Factors Graph

This is the Human Factors chart containing all the time that you pay your agents to do something other than handle the workload. Both discretionary and non-discretionary shrinkage are included, as well as presence and utilization hours, and it is this utilization calculation that converts the bodies-in-chair requirements into the fully loaded total required staff numbers.

Why is this important?

The exercise of diligently capturing this time each month creates awareness of where the time is truly going, and this helps the contact center manage this in a responsible way. In addition, having a precise utilization measurement shows the impact on the required staff for the times you want to see what happens if you were to change your operating hours or are considering different service goals.

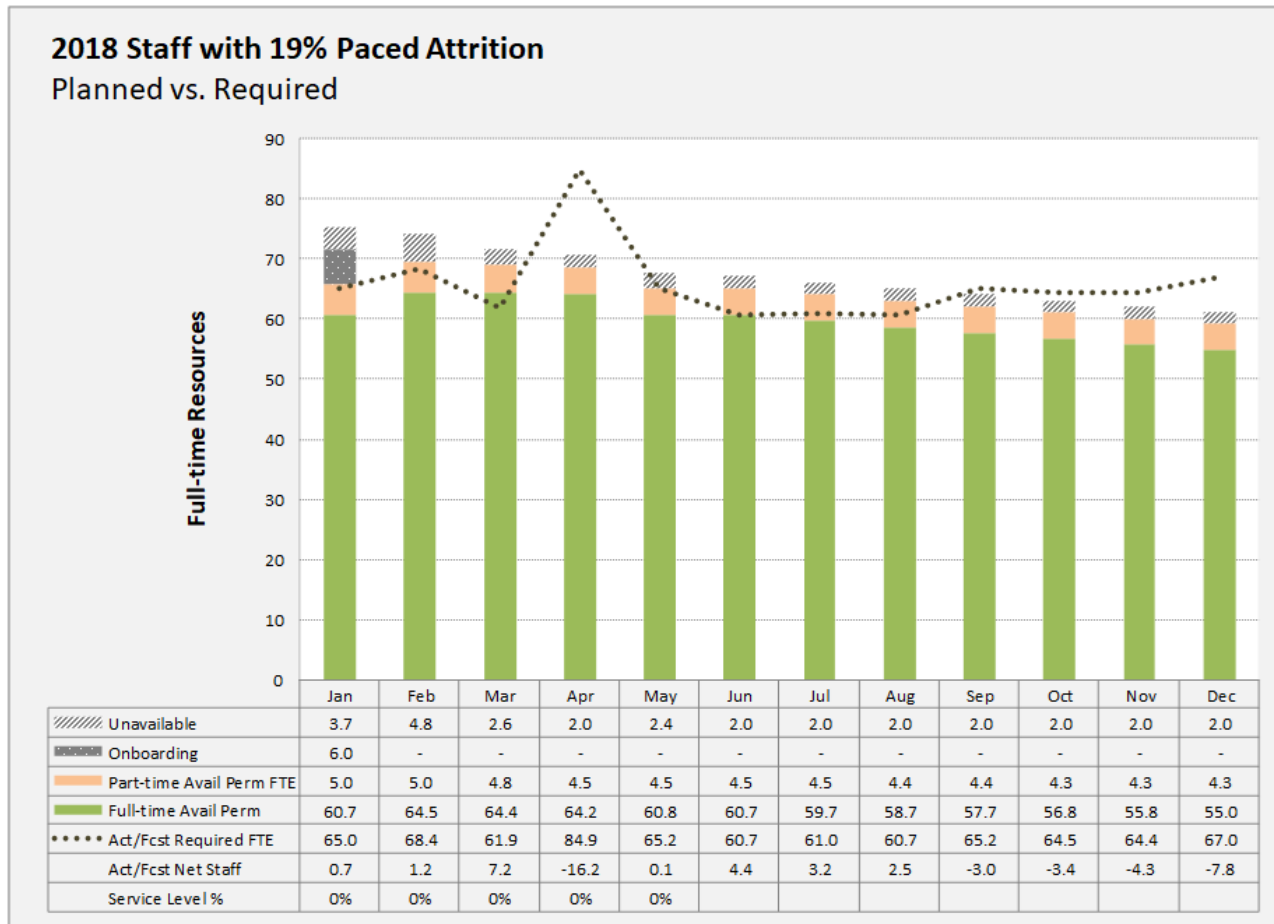


Figure 5: Required vs. Planned Staff

This is the staffing model chart. The required headcount line is shown with the planned headcount, indicating when you will be overstaffed, understaffed, or perfectly staffed.

Why is this important?

It will include suggestions on when to hire more people and when to allow natural attrition to occur without rehiring right away. It also shows the active training headcount and the historical service level achieved with the staff on hand.

APPENDIX C: Terms and Conditions

1. **Description of Services.** Human Numbers agrees to provide services to **Company** (the "Client") described in Appendices A & B, per the terms and in support of the project described in this Agreement.
2. **Term.** Monthly invoices will be issued on or after the first business day of each calendar month for the previous month's work unless otherwise requested by the Client. Payment terms are net-30, payable by check or electronic transfer. This service is provided month-to-month with a 30-day cancellation notice from either party.
3. **Intellectual Property.** Work Product includes, but is not limited to, the documentation, including all ideas, processes, specifications, flow charts, notes, outlines, models, prototypes, and other materials, in whatever form developed which Human Numbers conceives, creates, discovers or invents, either while employed by Client, or previously conceived, created, discovered or invented and are incorporated into any deliverables to Client. Human Numbers owns and controls their own Intellectual Property.
4. **Independent Contractor.** The parties acknowledge and agree that Human Numbers is an independent contractor. This Agreement shall not create the relationship of employer and employee, agent, affiliate, partnership, nor a joint venture between the Client and Human Numbers.
5. **Warranties and Indemnities.** Human Numbers warrants that the Services performed will be of high quality and performed in a professional manner. The Services will meet and conform to the requirements agreed to by the parties. Human Numbers shall promptly make all corrections necessary to allow the Work Product to conform to the Client's requirements within 30 days after the product is delivered
6. **Force Majeure.** Notwithstanding any other provision of this Agreement, no party to the Agreement shall be considered in default or breach of this Agreement or liable for any loss or damages or for any delay or failure in performance due to any cause beyond its reasonable control.
7. **Entire Agreement.** This document holds the entire agreement of the parties regarding the subject matter described herein, and all other promises, representations, understandings, arrangements, and prior agreements related thereto are merged herein and superseded hereby. The provisions of this Agreement may not be amended except by an agreement in writing agreed upon by both parties.
8. **Notices.** All notices or other communications hereunder to Human Numbers shall be in writing and delivered by email to Tiffany LaReau, Tiffany@HumanNumbers.com, or by mail to: Human Numbers, 4030 Orchard Way, Milton, GA 30004.
9. **Non-Disclosure.** Both parties agree to enter a confidential relationship with respect to the disclosure of proprietary and confidential information, including (but not limited to) pricing and revenue-related information, performance results, business processes or strategies, and any documents pertaining to the above.

10. Client Responsibilities. Employees play an active role in the success of the project. As such, they assume responsibility to ensure participation in meetings and agree to deliver requested materials promptly. It is also understood that any delays or scheduling changes caused by them may affect timelines and overall project success and agrees not to hold Human Numbers responsible for costs incurred due to any such delays or changes.

Task	Client's Responsibility	Human Numbers' Responsibility
1. Supply Historical Data, Assumptions, and Goals	X	
2. Normalize, build, and store historical patterns and seasonal trends		X
3. Create Forecasts and measure forecast potential and accuracy		X
4. Produce schedule compliance rules, preferences, and human factors	X	
5. Generate Schedules and calculate Erlang Factors and schedule inflexibility		X
6. Publish Schedules to Outlook		X
7. Administer Schedules	X	
8. Review Forecasts, Schedules, & Staffing Models in Weekly Tactical and Monthly Strategic Meetings	X	X
9. Make Hiring Plan recommendations according to weekly projections		X
10. Execute the Hiring Plan	X	
11. Set Up RTA System and Train Supervisors/Employees on RTA		X
12. Plan Meetings and enter pre-approved exceptions and absences		X
13. Enter unplanned exceptions > 2 hours duration (by the end of the next business day)		X
14. Monitor Real-Time Adherence	X	
15. Approve wait-listed time-off requests	X	

11. Insurance. During the term of this Agreement Human Numbers shall carry:

- a) Commercial General Liability Insurance with limits of \$1,000,000/\$1,000,000 aggregate
- b) Professional Liability Errors & Omissions Insurance with limits of \$1,000,000 per occurrence/\$1,000,000 aggregate

12. Data Security. Human Numbers enforces the proper use and management of all data and the systems used by all employees and ensures the privacy and confidentiality of all information. All devices are secured with up-to-date virus protection and adequate password control. Any off-site or cloud-based service used meets standard data security, encryption, and privacy rules. Human Numbers ensures that all safeguards comply with applicable data protection and privacy laws. Any found vulnerabilities will immediately be conveyed to all parties involved, and the proper corrective actions will be put into place to remedy and prevent any future security breaches.